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# **OUTREACH AND EDUCATION GRANT PROGRAM BIDDERS CONFERENCE**

Covered California  
Wednesday, February 6, 2013  
2:00 – 4:00 PM

# Agenda

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1. Covered California Opening Remarks
2. Covered California Grant Program
3. Target Populations
4. Grantee Activities
5. Grant Program Application
6. Electronic Application
7. Evaluation Process
8. Timeline
9. Process for Bidder's Q&As

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# Covered California Opening Remarks

# Covered California Vision & Mission

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## Vision

- The vision of Covered California is to improve the health of all Californians by assuring their access to affordable, high quality care.

## Mission

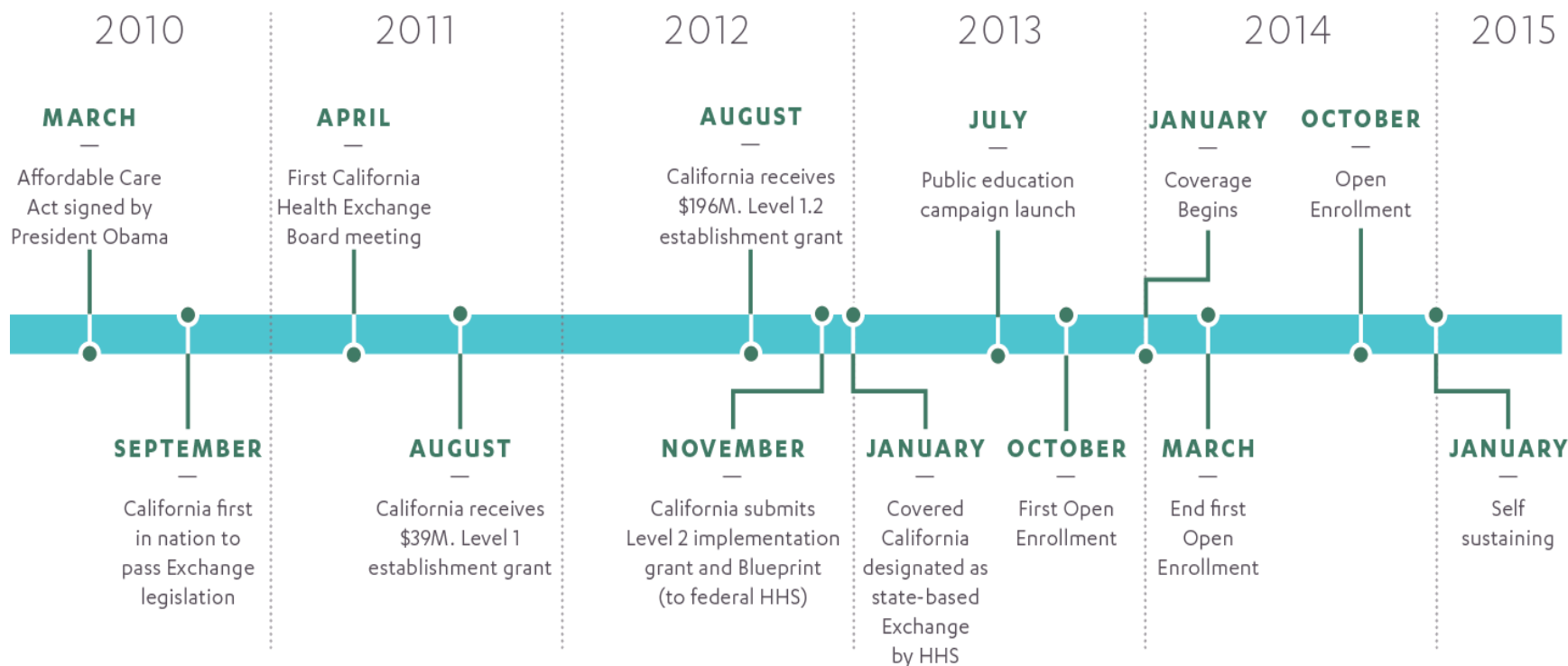
- The mission of the Covered California is to increase the number of insured Californians, improve health care quality, lower costs, and reduce health disparities through an innovative, competitive marketplace that empowers consumers to choose the health plan and providers that give them the best value.

# Covered California's Values

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- Consumer-focused: At the center of Covered California's efforts are the people it serves, including patients and their families, and small business owners and their employees. Covered California will offer a consumer-friendly experience that is accessible to all Californians, recognizing the diverse cultural, language, economic, educational and health status needs of those we serve.
- Affordability: Covered California will provide affordable health insurance while assuring quality and access.
- Catalyst: Covered California will be a catalyst for change in California's health care system, using its market role to stimulate new strategies for providing high-quality, affordable health care, promoting prevention and wellness, and reducing health disparities.
- Integrity: Covered California will earn the public's trust through its commitment to accountability, responsiveness, transparency, speed, agility, reliability, and cooperation.
- Partnership: Covered California welcomes partnerships, and its efforts will be guided by working with consumers, providers, health plans, employers and other purchasers, government partners, and other stakeholders.
- Results: Covered California will be measured by its contributions to expanding coverage and access, improving health care quality, promoting better health and health equity, and lowering costs for all Californians.

# Covered California Milestones



Source: Covered California Report to the Governor and Legislature, January 2013

# Outreach and Marketing to California's Uninsured

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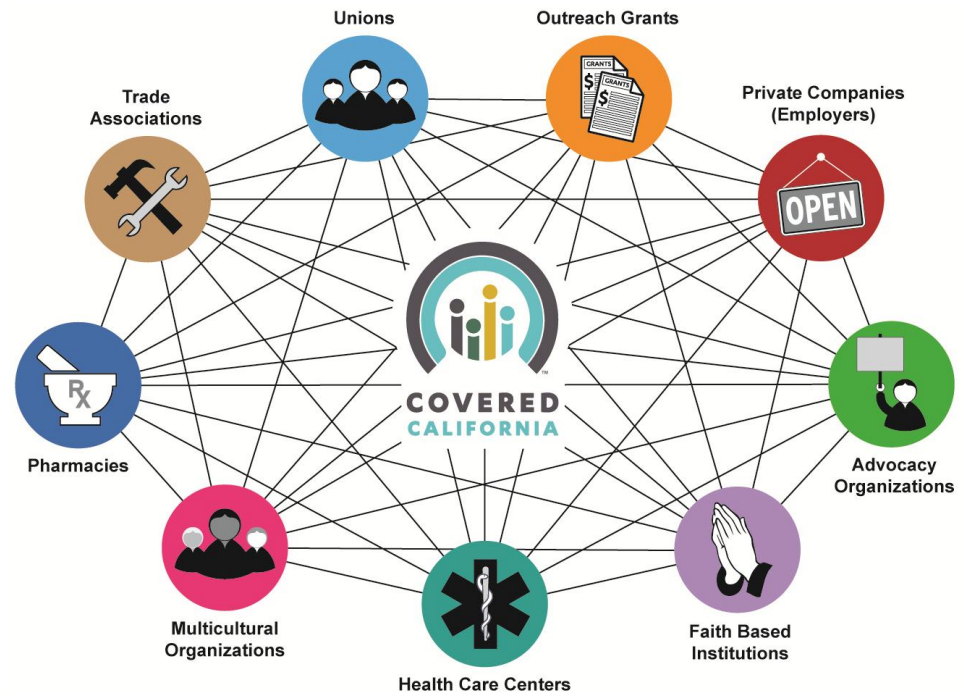
Maximize the enrollment of uninsured Californians:

- Provide a one-stop marketplace for affordable, quality health care options and health insurance information
- Educate Californians to understand the benefits of coverage
- Encourage insured Californians to retain their coverage
- Ensure the availability of affordable health insurance coverage for all eligible Californians

Ultimately, the goal is to have every eligible Californian get health insurance coverage

# Statewide Mobilization Effort

- Providing a stakeholder engagement framework for our Community Based grants and In-person Assisters program to reach strategic points of entry where people “live, work, shop, and play.”
- Community-based grants program, funded at \$43M over 2013-2014 to:
  - Mobilize and educate key influencers
  - Launch key milestone events
  - Establish market driven partnerships
  - Manage educational outreach and enrollment





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# Covered California Grant Program

# Grant Program Main Goal and Objectives

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**Goal: Educate eligible Californians about Covered California and collect leads for Assisters and the Service Center who will perform application assistance.**

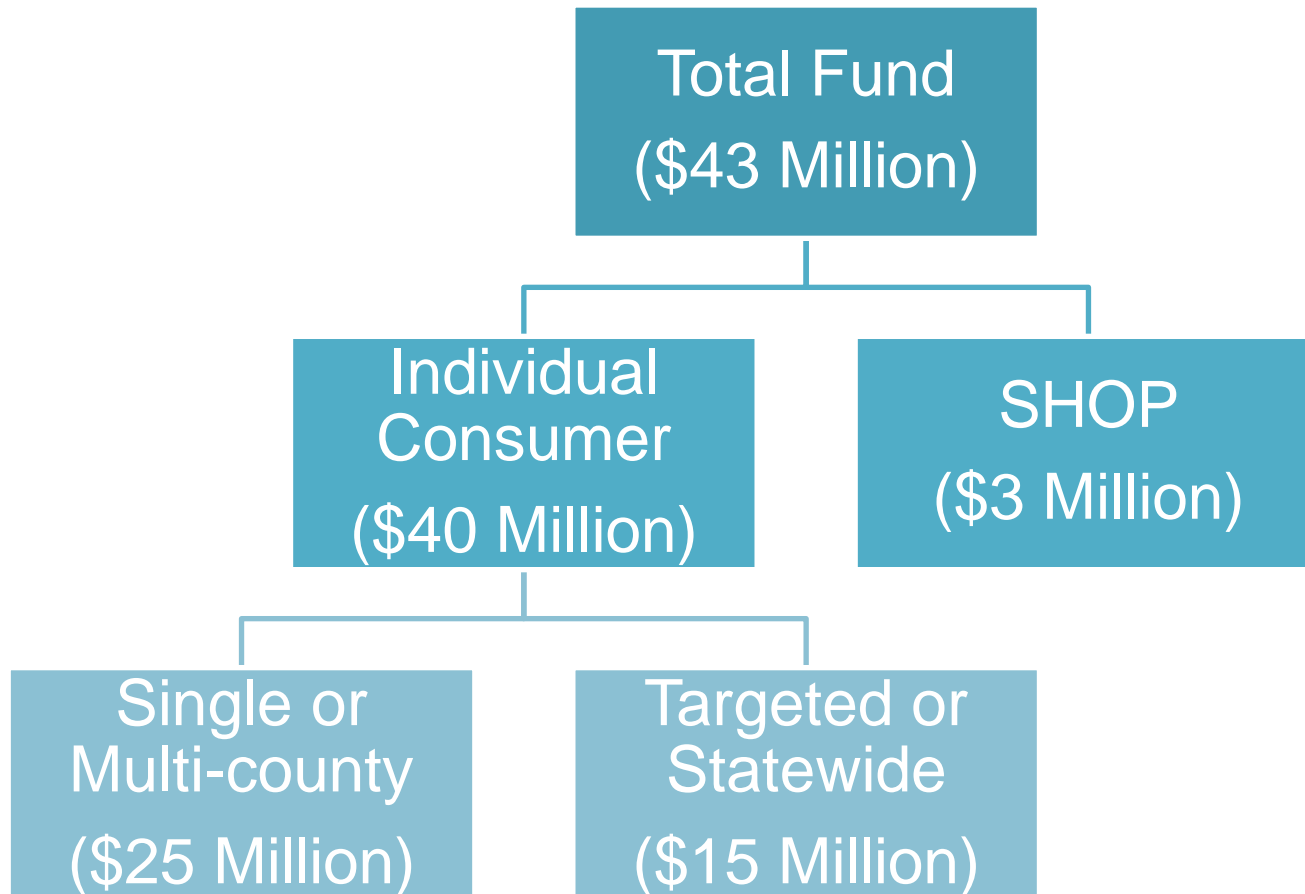
1. Ensure participation of organizations with trusted relationships with the uninsured markets that represent the cultural and linguistic diversity of the state.
2. Deliver a cost-effective program that promotes and maximizes enrollment.
3. Disseminate clear, accurate and consistent messages to target audiences that eliminate barriers, increase interest and motivate consumers and small businesses to enroll into coverage.

Grant Application Section 2.2.1

# Grant Funding Pools

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Funding Period: May 2013 – December 2014



Grant Application Section 4.1

# Grant Funding

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Applicants of either Individual Consumer or SHOP grant proposals may propose to reach their target markets in the following ways:

- **Single County:** Targeting one or multiple specific populations, or the general eligible population, within one county only.
  - Example: All uninsured in Alameda county.
- **Multi-County:** Targeting one or multiple specific populations, or the general eligible population, within two or more counties.
  - Example: Spanish-speaking populations in Kern and Tulare Counties and Restaurant workers in Kings County.
- **Targeted or Statewide:** Targeting one or multiple specific populations that are not defined by specific geographical boundaries, or targeted specific or general eligible populations on a statewide level.
  - Example: Uninsured males that are 26 – 35 years old throughout California.

# Grant Funding

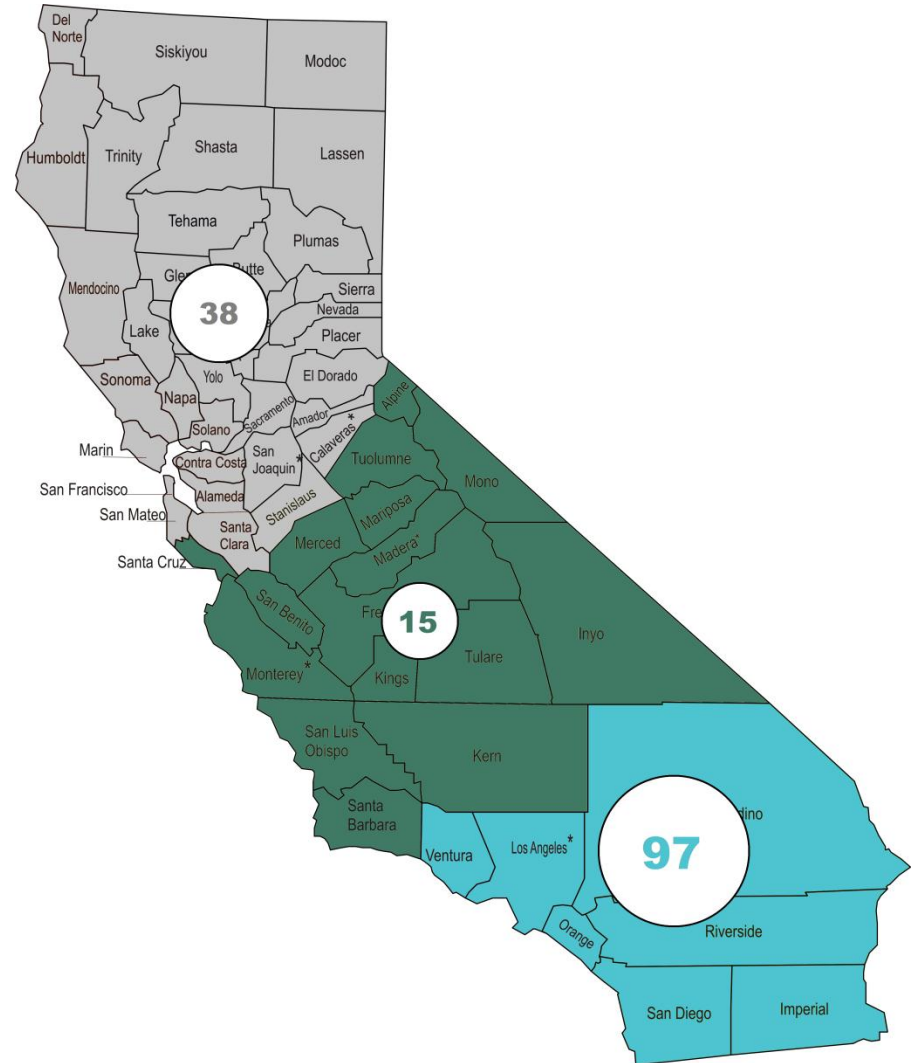
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For applicants seeking to target the individual consumer at a single or multi-county level, maximum county funding amounts were established based on the number of QHP-eligible individuals in each county.

- Applicants may not request more than the maximum available funds for each county.
- Counties with an anticipated funding amount of less than \$250,000 are not eligible to be including in a single-county grant application; and should be included in a multi-county application.
- Refer to Grant Application pages 40 – 41 for the complete list of estimated funding pools by county.

# Potential Grant Awards by Region

- Maximum award is \$1 million
- Minimum award is \$250,000
- Less populated counties or smaller target populations (those with less than 5,000 estimated enrollment) are highly encouraged to participate in multi-county initiatives and coalitions.



Grant Application Section 4.1.2

# Covered California Outreach

The Grant Program will align with the Statewide Outreach and Marketing Program and the Assisters Program.



Organizations not selected for the Outreach and Education Grant Program may participate in Covered California's campaign as Assister Enrollment Entities and partners in the Community Outreach Network.

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# Target Populations

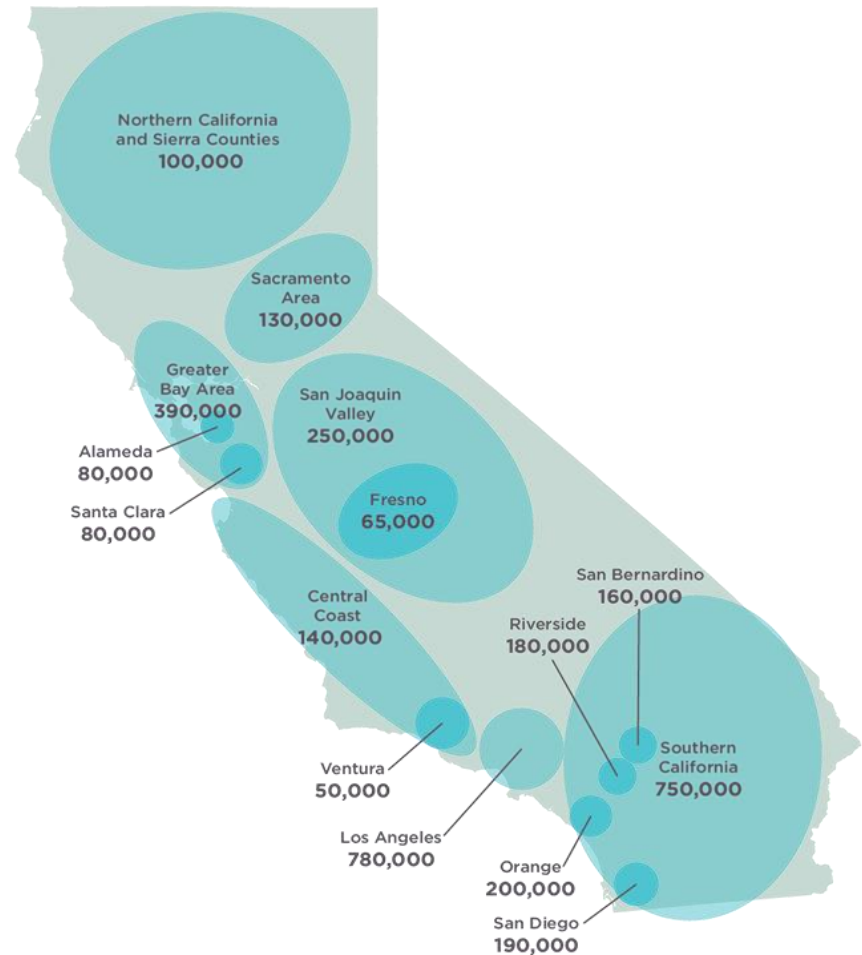


# Where is CA's Eligible Population

## CALIFORNIA'S EXCHANGE SUBSIDY ELIGIBLE INDIVIDUALS BY REGION

Eligible for Subsidies  
By Geography:

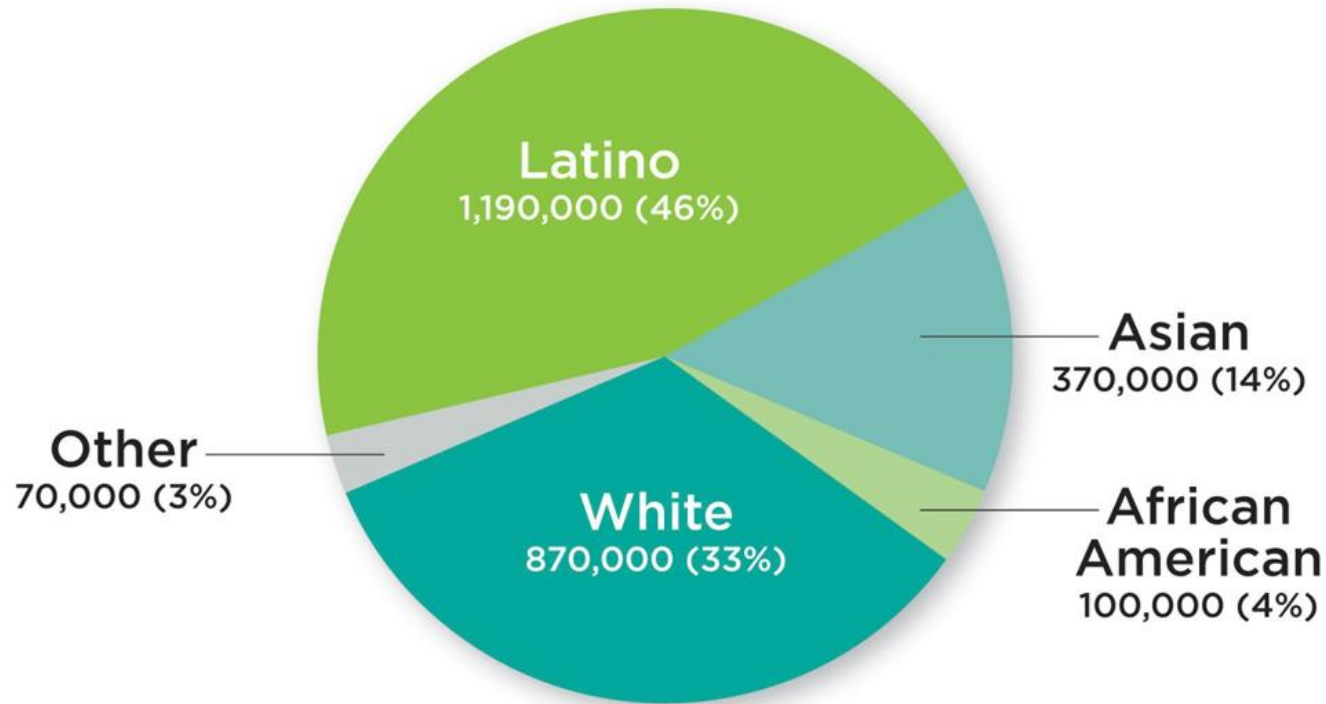
California's geography presents a unique challenge. Our ability to reach the uninsured in urban and rural settings spanning over 163k square miles will be critical to the success of this program.



# Who is CA's Eligible Population

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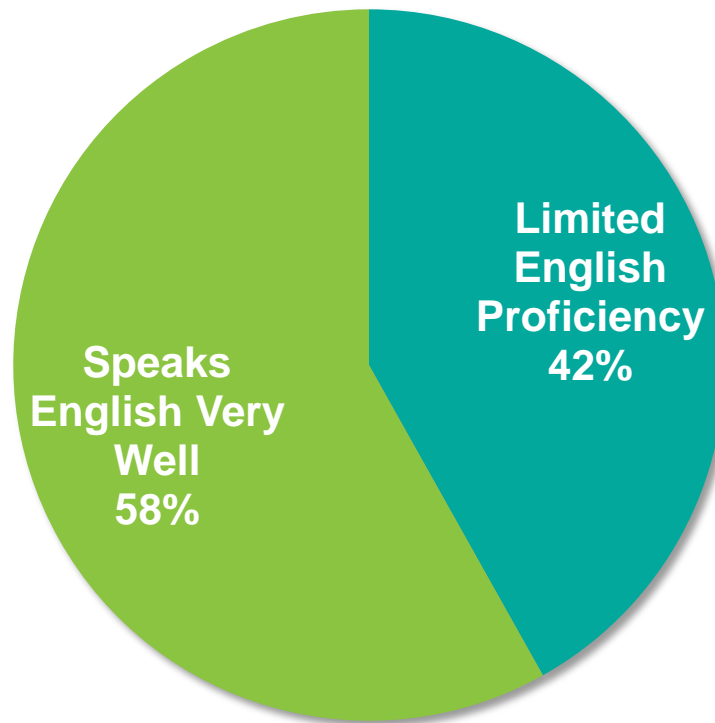
Eligible for Subsidies By Ethnicity:



# Who is CA's Eligible Population

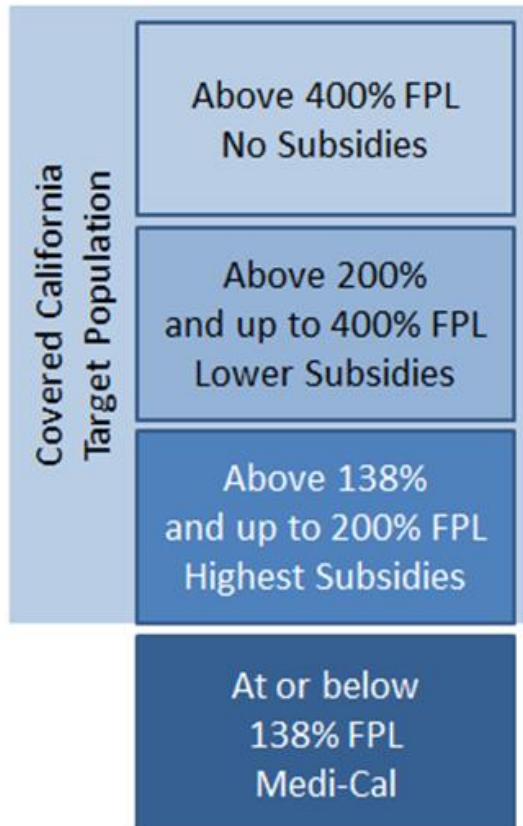
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Eligible for Subsidies By Language:



# Target Populations

Target Population and Program Eligibility  
Based on Federal Poverty Levels of Households



The primary target population of Covered California's marketing and outreach efforts are the 5.3 million California residents projected to be uninsured or eligible for tax credit subsidies in 2014:

- 2.6 million who qualify for subsidies and are eligible for Covered California qualified health plans; and
- 2.7 million who do not qualify for subsidies, but now benefit from guaranteed coverage and can enroll inside or outside of Covered California.

Grant Application Section 2.2.2

# Individual Target Populations

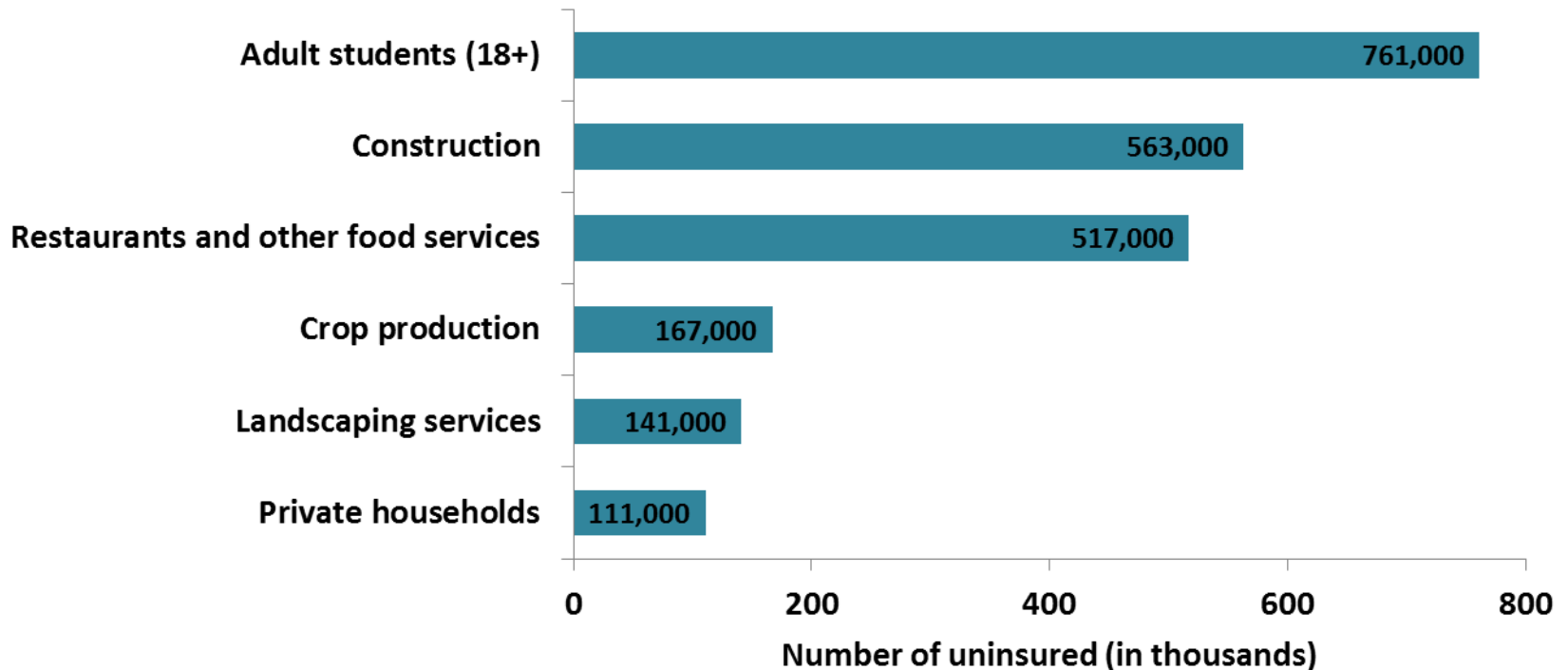
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Examples of target markets for individuals include, but are not limited to, the following:

- Geographic areas, including rural areas, where a high number of eligible uninsured individuals reside;
- Hard-to-move populations (e.g., young invincibles);
- College students;
- Populations with Limited-English Proficiency;
- Culturally diverse populations and communities; and
- Employment sectors in which there are high numbers of uninsured workers.

# California's Uninsured: Where do they work?

## Top Six Employment Sectors with Largest Number of Uninsured



Source: American Community Survey, U.S. Census Bureau, 2010

# SHOP Target Populations

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Examples of target markets for small businesses include, but are not limited to, the following:

- Geographic areas with a high number of small businesses, including minority business owners, that are eligible to purchase health insurance for their employees.
- Specific industries or trades that are regional or statewide, that have a higher propensity for uninsured workers.

# Resources

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Applicants are encouraged to refer to the following resources to gain a better understanding of the eligible populations that qualify for health care coverage through Covered California.

Proposals must cite the methodology/research used to substantiate the target population(s) proposed.

- **CalSIM Model 1.8** (Appendix A): Demographic breakdowns of those expected to enroll in QHPs.
- **California Health Care Foundation Employer Health Benefits Study** (Appendix B)
- **Healthy City:** <http://www.healthycity.org>: Website providing census and other demographic data and mapping and graphing capabilities



# List of Community Events

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- Appendix E is available to download online through the Electronic Grant Application available at:  
<http://www.healthexchange.ca.gov/Pages/OutrchandEdProg.aspx>
- Applicants should use this list of events to refer to when writing their outreach and education plans and when completing Attachment A.8 – Outreach and Education Method Worksheets.

# Cycle 2 Gap Analysis

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- After the Cycle 1 grant award process, Covered California will conduct a thorough analysis to determine whether or not there are any gaps in conducting outreach and education activities in specific geographic areas and/or target populations.
- In the event gaps are identified, Covered California will administer a Cycle 2 grant award process. The Cycle 2 process will focus on specific geographic areas and/or target populations that were not awarded during the Cycle 1 process.

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# Grantee Activities

# Grantee Activities

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- Innovative, comprehensive and cost effective plans will be highly considered.
- Applicants are required to clearly articulate and substantiate their proposals.
- Proposals should adequately address and identify the targeted populations.
- Outreach and Education plans should be tailored to meet the needs and specifications of the target populations.
- Applicants should demonstrate a thorough understanding of and existing relationships with the targeted populations.

Grant Application Section 2.3

# Grantee Activities

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Each Applicant will have to articulate and provide support for their proposed allocation of time towards outreach and education messages. Covered California recommends the following allocation of time:

- 70% of grant activities allocated towards the delivery of in-depth Education messages (10 – 15 minutes)
- 30% of grant activities will be allocated towards the delivery of brief Outreach messages (1 – 5 minutes)

Organizations have flexibility in the channels, including non-face-to-face, venues or formats, such as social media, in which outreach and education messages are delivered, as well as their mode for reaching their target population(s), which must be specifically explained in the Grant Application.

# Outreach and Education Plans

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Applicants will need to develop a plan to deliver outreach and education messages, including monitoring and evaluation tools that measure the total number of households or businesses they plan to reach.

Covered California will only consider plans that are effective, measurable and evidence-based. When presenting plans, the Applicant must:

- Describe the plan's strategies, tactics, target goals and objectives;
- Describe how the plan will be monitored, evaluated and adjusted as necessary to meet target goals;
- Explain why the proposed approach is a proven and effective one; and
- Provide details and demonstrate the Applicant's prior success in effectively reaching the target populations.

***Collaboration with other eligible entities is highly encouraged.***

# Collecting Leads

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Grantees will be required to provide Covered California with leads for follow up with consumers or small businesses that are potentially eligible and interested in receiving more information about enrolling.

A lead is defined as collecting the individual's name, preferred method of contact (i.e., e-mail, mail, or phone), respective contact information and language preference.

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# Grant Program Application



# Conflict of Interest

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- Applicants are responsible for complying with the Conflict of Interest standards (Exhibit C, Paragraph XI, D, 1) and Contractor Limitations (Exhibit E, Paragraph VI) requirements in the Agreement.
- It is the responsibility of each Applicant to consult with their Legal Advisors to determine if a conflict of interest exists.

# Eligible Entities

## List of Eligible Organization Types

Community or Consumer-focused non-profit organization; Consumer Advocacy, community-based organization, or faith-based organization

Trade, industry or professional association, labor union, employment sector, Chamber of Commerce targeting specialty populations

Commercial fishing industry organization, ranching or farming organization

Health Care Provider: such as hospital, provider, clinic or county health department

Community College, University, School, or School Districts

Native American tribe, tribal organization, or urban Native American organization

City Government Agency or Other County Agency

\*For-Profit Entities may apply as a subcontractor to a collaborative.

Grant Application Section 5.1

# Guidelines on Multiple Application Submissions

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- Applicants are encouraged to submit **one** comprehensive proposal that they are best positioned to deliver.
- Applicants should propose to either target consumers eligible for affordable health insurance programs through Covered California or small businesses eligible for SHOP
  - If an Applicant wants to propose to target both, they must submit two separate proposals that are distinct and do not overlap outreach efforts.
- Applicants applying to target individual consumers are permitted to apply as a lead Applicant on one application and on a second application as a subcontractor as part of a collaborative as long as the activities are distinct.
- Applicants applying as a lead and as a subcontractor must apply to different funding pools. Covered California will not accept multiple applications to the same funding pool from a single Applicant.

Grant Application Section 6.2

# Use of Subcontractors

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- Collaborative may determine the role of each partner in implementing the proposed plan.
- The use of any subcontractor(s) must be fully explained in the Grant Application. Any and all subcontractors employed for the purpose of this contract must meet all of the same standards as the Grantee.
- Responses in the Grant Application should address the qualifications and activities of each subcontractor.
- The Lead Agency should complete each required form on behalf of the Collaborative. Subcontractors should not submit duplicates of required forms.
- Lead agencies are required to submit two letters of reference and one additional letter for each subcontractor.

Grant Application Section 6.3

# Notice of Intent to Respond

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- Interested organizations are highly encouraged to submit a Letter of Intent to Respond and Response to Collateral Materials Request Form.
- Potential Applicants should submit the Letter of Intent to Respond to the Single Point of by **Thursday, February 7, 2013 (5:00 p.m. PST)**, either through email or postal mail.
- Applicants that submit a Letter of Intent to Respond will receive updates via email to any changes to the Grant Application, addendums or modifications to the timeline.
- A list of entities that submit letters of intent will be posted and available on the Electronic Grant Application and:  
<http://www.healthexchange.ca.gov/Pages/OutrchandEdProg.aspx>

# Grantee Agreement

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- Applicants should review the draft agreements provided in the Grant Application (Exhibits A – E) to understand the potential contractual obligations.
- Applicants do not have to sign and submit this document when submitting the Grant Application.
- Final Agreement will be posted online on the Electronic Grant Application.

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# Electronic Grant Application

# Electronic Grant Application

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- Applicants are **strongly encouraged** to submit their application through the Electronic Grant Application available on the Exchange's website at:  
<http://www.healthexchange.ca.gov/Pages/OutrchandEdProg.aspx>.
- Users may register and begin the online application process, additional authorized users may also work simultaneously on the same application.
- The Electronic Grant Applications offers several validations when completing the online forms; such as checking for completeness and correct mathematical calculations.

Applications (electronic or paper) must be received by **March 4, 2013 (5:00 p.m. PST)**. Late Applications will not be accepted.

Grant Application Section 6.1



# Electronic Grant Application

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- Specialized technical support on the Electronic Grant Application is available by calling the Grants Help Desk: (866) 622-5252
- Certain sections of the application will not be available to work on until a previous section is completed first. For instance, you must first complete Attachment A.2 before you can begin Attachment A.3.
- Applicants will have the ability to print their application and review before submitting.
- The Application can only be submitted by the user who is designated as the Primary Contact.
- After the application is submitted, it may be “unlocked” and resubmitted, if amendments need to be made.

# Grant Application Submission Structure

| Section #          | Title  | Maximum Page Count |
|--------------------|--|--------------------|
|                    |  | By Section         |
|                    | Table of Contents  | N/A                |
| 1.0                | Cover Letter   | 1                  |
| 2.0                | Qualifications and References  | 7                  |
| 3.0                | Project Personnel  | 2                  |
| 4.0                | Approach to Statement of Work  | 5                  |
| 4.1                | Target Population  |                    |
| 4.2                | Outreach and Education Plan  |                    |
| 4.3                | Approach to Monitoring, Quality Assurance and Reporting  |                    |
| 5.0                | Project Costs  | 1                  |
| <b>Attachments</b> |  |                    |
| A.1                | Applicant Background Information Worksheet   | N/A                |
| A.2                | Applicant Funding Information Worksheet  | N/A                |
| A.3                | Applicant Experience with Target Population Worksheet  | N/A                |
| A.4                | Subcontractor Information Worksheet (If applicable)  | N/A                |
| A.5                | Coordination with Assister Program Questionnaire   | N/A                |
| A.6                | Foundation Matching Questionnaire  | N/A                |
| A.7                | Budget Worksheet   | N/A                |
| A.8                | Outreach and Education Method Worksheet  | N/A                |
| B.1                | Signed Contractor Certification Clauses (CCC-307)  | N/A                |
| B.2                | Certification regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Covered Transactions | N/A                |
| B.3                | Darfur-Contracting Act Form  | N/A                |
| B.4                | Conflict of Interest Certification   | N/A                |
| B.5                | Evidence of Eligibility  | N/A                |

Grant Application Section 6.4.2

# Paper Application Formatting Requirements

| Subject                 | Requirement  |
|-------------------------|--|
| Paper Size (Paper Copy) | 8 ½ X 11 inch paper (letter size)  |
| Margins                 | 1 inch margins   |
| Font                    | 12 point Arial font  |
| Spacing                 | Proposals must be single-spaced  |
| Page Limit              | 16 pages single spaced <u>excluding</u> attachments and forms  |
| Number of copies        | 8 bound copies   |
| Shipment                | All Grant Applications must be sealed and addressed to the Single Point of Contact.  |
| Delivery Method         | The following paper copy Grant Application delivery methods are acceptable: <ul style="list-style-type: none"><li>▪ US Mail</li><li>▪ Express Delivery</li><li>▪ Hand Delivery</li></ul> |
| CD-ROM                  | A CD Rom containing a scanned version (in PDF format) of the entire application package, <u>in addition</u> to the 8 bound paper copies.   |

Grant Application Section 6.4.1

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# Evaluation Process

# Evaluation Criteria

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The evaluation process will use a 100 point rating using the following factors:

- (20 Points) Desired Qualifications and References (Section 6.5.3)
- (40 points) Statement of Work: Approaches to Performing Outreach and Education Activities Covered California **will only consider plans that are effective, measurable and evidence-based.**
- (10 points) Approach to Monitoring, Quality Assurance, Reporting (Section 6.5.5.3); and
- (30 points) Proposed Personnel and Project Costs (Section 6.5.4 and 6.5.6)

# Outreach and Education Grant Program Timeline

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| Activity  | Date              |
|---|-------------------|
| Release of Outreach and Education Grant Program Application | January 25, 2013  |
| Bidders Conference  | February 6, 2013  |
| Grant Application Responses Due                             | March 4, 2013     |
| Notice of Intent to Award                                   | April 26, 2013    |
| Grantee Training  | May – August 2013 |
| Cycle 2 Grant Application Release                           | May 24, 2013      |
| Cycle 2 Grant Application Conference                        | TBD               |
| Cycle 2 Grant Application Responses Due                     | June 24, 2013     |
| Cycle 2 Notice of Intent to Award                           | July 15, 2013     |

# Process for Bidder's Q&As and Timeline

Bidders have 3 opportunities to pose written questions and receive answers as outline below. All questions must be posed in writing. Questions submitted will be answered in writing and posted pursuant to the table below on the Electronic Grant Application and at:

<http://www.healthexchange.ca.gov/Pages/OutrchedProg.aspx>

| Activity   | Date                         |
|--|------------------------------|
| <b>Bidders submit 1st round of questions</b>                   | Monday, February 4, 2013     |
| <b>Release Covered California Q&amp;A 1<sup>st</sup> Round</b> | Wednesday, February 6, 2013  |
| <b>Bidders submit 2nd round of questions</b>                   | Wednesday, February 13, 2013 |
| <b>Release Covered California Q&amp;A 2<sup>nd</sup> Round</b> | Tuesday, February 19, 2013   |
| <b>Bidders submit 3rd round of questions</b>                   | Tuesday, February 26, 2013   |
| <b>Release Covered California Q&amp;A 3<sup>rd</sup> Round</b> | Friday, March 1, 2013        |
| <b>Grant Applications Due</b>                                  | Monday, March 4, 2013        |
| <b>Announce Award of Grantees</b>                              | Friday, April 26, 2013       |
| <b>Cycle 1 Grantee Training</b>                                | Monday, May 13, 2013         |

# Assisters Program

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- Assisters Program: In-Person Assistance (IPA) and Navigator Stakeholder Webinar
- February 7, 2013; 1:30 – 3:30 PM
- Register for the webinar on the Stakeholder's tab at:  
<http://www.healthexchange.ca.gov>
- For More Information, please call the Assisters Help Desk at: 888-402-0737



# For More Information

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Applicants may only contact the Single Point of Contact as noted in Table below for any matters related to this Grant Application.

Comments or questions must be submitted in writing utilizing the form provided in Appendix F, as outlined in Section 3.2.5.

|                        |  |
|------------------------|--|
| <b>Mailing Address</b> | <b>Richard Heath and Associates, Inc.<br/>Julie Weigand, Senior Program Manager<br/>590 W. Locust Ave., Suite 103<br/>Fresno, CA 93650</b> |
| <b>Phone</b>           | <b>(866) 622-5252 (Grants Help Desk)</b>   |
| <b>E-mail</b>          | <b><a href="mailto:grantinfo@ccgrantsandassisters.org">grantinfo@ccgrantsandassisters.org</a></b>  |